PHYSICAL PLANT
OPERATING POLICY AND PROCEDURE

PP/OP 02.09: Forklift Operation and Safety

DATE: December 10, 2009

PURPOSE

The purpose of this Operating Policy and Procedure (PP/OP) is to establish the safety requirement relating to the maintenance, training, operation, and responsibilities of Physical Plant forklifts.

REVIEW

This PP/OP will be reviewed December of each odd numbered year (ONY) by the associate director for business office and material resources for physical plant with recommendations forwarded to the managing director for physical plant.

POLICY/PROCEDURES

1. General Policy

   This PP/OP applies to all Physical Plant employees who are required to operate Physical Plant forklifts and who are custodians of Physical Plant forklifts. This procedure will be used to establish training requirements, provide safe operational instructions, and align responsibilities.

2. Operator Qualifications

   Only TTU Environmental Health & Safety trained and authorized persons will be permitted to operate Physical Plant forklifts.

   No student assistant will be authorized to operate Physical Plant forklifts.

3. Training

   a. ALL TRAINING IS SPECIFIC TO EACH INDIVIDUAL FORKLIFT
      All department forklift training will be conducted by Environmental Health and Safety. Training will consist of a combination of classroom instruction and practical hands-on demonstration of competence.
b. Personnel who have not been authorized to operate Physical Plant forklifts may operate them only for the purposes of training and only under the direct supervision of the Environmental Health and Safety trainer. The training program will be presented to all new operators regardless of previous experience.

c. Upon successful completion of the training program, personnel will be issued a certification card, which designates which forklift(s) they may operate. Only employees who hold a current and valid certification card for a specific forklift may operate Physical Plant forklifts.

4. Custodians

a. All Physical Plant forklifts have an assigned number that appears on the body of the forklift on the driver’s side. Each forklift has an assigned custodian who holds the forklift key and is responsible for scheduling its use.

<table>
<thead>
<tr>
<th>Assigned Number</th>
<th>Make</th>
<th>Custodian</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Clark</td>
<td>Department Supply</td>
<td>Department Supply</td>
</tr>
<tr>
<td>2</td>
<td>Clark</td>
<td>Central Warehouse</td>
<td>Erskine Warehouse</td>
</tr>
<tr>
<td>3</td>
<td>TCM</td>
<td>Central Warehouse</td>
<td>Central Warehouse</td>
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</tr>
<tr>
<td>5</td>
<td>Towmotor</td>
<td>ITC</td>
<td>ITC</td>
</tr>
<tr>
<td>6</td>
<td>Clark</td>
<td>Warehouse</td>
<td>Erskine Warehouse</td>
</tr>
</tbody>
</table>

b. Each forklift custodian will check the Authorized Forklift Operators list to determine completion of training requirements before issuing the key to any operator.

5. Fueling and Maintenance

a. Fueling

(1) Fuel tanks will not be filled while the engine is running. Spillage will be avoided.
(2) Oil or fuel spills will be carefully cleaned up or completely evaporated and the fuel tank cap replaced before restarting the engine.

(3) No forklift will be operated with a leak in the fuel system. The forklift should be immediately placed out of service and locked/tagged until repairs are made.

b. Maintenance

(1) All forklifts not in safe operating condition will be removed and locked/tagged from service. All repairs will be made by authorized personnel in an approved location.

(2) All forklifts requiring service will be reported immediately to the custodian of that forklift.

(3) Forklifts will be inspected before being placed in service and will not be placed in service if the inspection shows any condition adversely affecting the safety of the vehicle. Defects will be immediately reported and corrected.

(4) Forklift custodians will document all forklift discrepancies and maintenance on the *Inspection and Maintenance Log* (Attachment A).

(5) When the temperature of any part of any forklift is found to be in excess of its normal operating temperature the vehicle will be removed from service until the cause of such overheating has been eliminated.

(6) Forklifts will be kept in a clean condition, free of excess oil and grease.

6. Procedures for Forklift Use

a. Qualified Physical Plant personnel may operate only department forklifts. If a forklift is required from another department, a formal request will be made to that department to provide the forklift and authorized driver for that forklift.

b. Should a section/shop/area require a forklift but have no trained operators, the foreman or supervisor should contact Department Supply to check availability and schedule the forklift and an authorized driver.
c. All forklift operators are required to complete a pre-trip and post-trip inspection. Each operator will document the inspection on the *Operator’s Daily Report* (Attachment B).

7. **Safety Rules for Forklift Operation**

Operators will comply with the following safety rules:

a. Do not lift a load while traveling.

b. Do not travel with a load lifted high.

c. Drive cautiously and slowly at corners and signal with the horn at blind corners.

d. Drive in reverse when traveling down an incline or ramp.

e. Check bridge plates into trucks being loaded to ensure their width and strength can take the forklift. Ensure truck brakes are set, and wheels chocked to ensure truck doesn’t move while forklift is entering, exiting.

f. Avoid sudden stops.

g. Do not haul passengers.

h. Watch overhead clearance and rear-end swing.

i. For best vision, drive backward with bulky loads, but face in the direction of travel.

j. Carry only loads well within the rated capacity of the forklift.

k. Lift loads with the mast vertical or tilted slightly to the rear.

l. Do not carry unstable loads or stacks; make sure loads are positioned evenly on forks for proper balance.

m. Lower loads slowly and lower the carriage all the way down when the forklift is parked.
8. **Compliance**

Due to the potential severity of forklift accidents, this operating policy and procedure will be strictly enforced. All operators and custodians will be held accountable for noncompliance. At-risk behaviors associated with Physical Plant forklifts will be subject to disciplinary action appropriate to the severity of the misbehavior.

9. **Accountability**

   a. Each director is responsible for enforcing compliance of the PP/OP.

   b. Superintendents/foremen will:

      (1) Designate personnel in their area of responsibility to be trained and certified as forklift operators.

      (2) Schedule designated personnel for training and certification to operate division forklifts.

      (3) Ensure only certified operators are assigned to operate division forklifts.

   c. Safety Coordinator will:

      (1) Coordinate Physical Plant training with Environmental Health and Safety for designated employees.

      (2) Maintain applicable training records.

      (3) Update Authorized Forklift Operators list when applicable.

   d. Department Supply will:

      (1) Maintain a current Authorized Forklift Operators list for the Physical Plant.

      (2) Control the release of the forklifts in their responsibility to qualified operators only.

      (3) Ensure the completion of the Operator’s Daily Report each time the forklift is scheduled by a qualified operator.

      (4) Be required to complete the Operator’s Daily Report at the beginning of each day and at the end of each day when the forklift has been in service by Material Resources personnel.
(5) Maintain the Operator’s Daily Report (Attachment B) forms and forward same to the safety office on the first work day of each month.

(6) Maintain the Inspection and Maintenance Log (Attachment A) listing all mechanical discrepancies.

(7) Schedule forklift maintenance by qualified mechanics only.

(8) Provide a forklift and driver to Utilities when scheduled.

e. Central Warehouse will:

(1) Maintain a current Authorized Forklift Operators list for the Physical Plant.

(2) Control the release of the forklifts in their responsibility to qualified operators only.

(3) Ensure the completion of the Operator’s Daily Report each time the forklift is scheduled by a qualified operator other than Material Resources personnel.

(4) Be required to complete the Operator’s Daily Report at the beginning of each day and at the end of each day when the forklift has been in service by Material Resources personnel.

(5) Maintain the Operator’s Daily Report (Attachment B) forms and forward same to the safety office on the first work day of each month.

(6) Maintain the Inspection and Maintenance Log (Attachment A) by listing all mechanical discrepancies.

(7) Schedule forklift maintenance by qualified mechanics only.

f. Employees will:

(1) Attend scheduled forklift training.

(2) Comply with all operating and safety instructions.

(3) Complete the Operator’s Daily Report (Attachment B) as stipulated above assuring the truck custodians are aware of any identified discrepancies.
### RESPONSIBILITIES

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<tr>
<th>POSITION</th>
<th>SECTION</th>
<th>MONTH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Associate Director for Business Office and Material Resources- Physical Plant</td>
<td>Review</td>
<td>December (ONY)</td>
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</table>

APPROVED: _________________________________

Reviewer

APPROVED: _________________________________

Managing Director – Physical Plant